

Primary care in the US: Challenges and changes



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The Walmart Opportunity: Can Retailers Revamp Primary Care?

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TOPICS: DELIVERY OF CARE, MARKETPLACE

By Julie Appleby
KHN Staff Writer

NOV 17, 2011

In-store medical clinics like those at Walmart – having established a beachhead with relatively healthy patients looking for convenient, low-cost care for simple problems – are eyeing a bigger prize, the millions of Americans with costly illnesses such as diabetes and heart disease.



Just as Walmart and other retailers shook up the prescription drug business by offering \$4 generic drugs, the industry now aims to apply its negotiating and marketing clout to tackle problems that vex consumers and the health sector: unpredictable costs, a lack of primary care

News from KHN

+ Topics

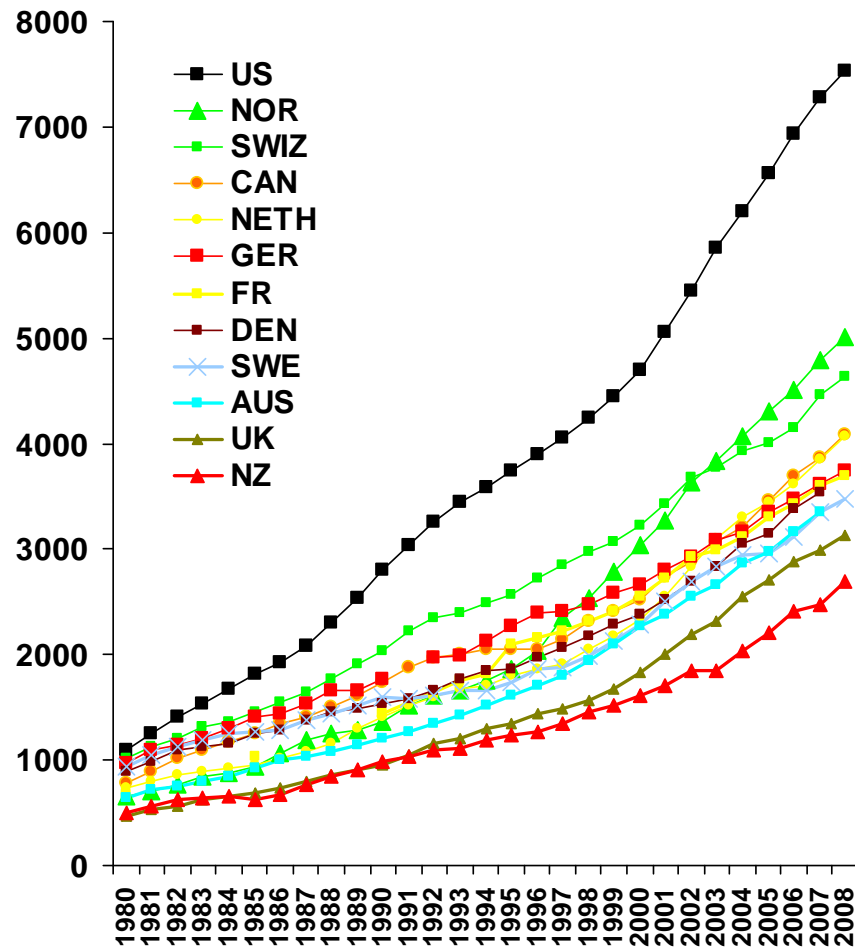
Aspirin, Other 'Common' Medications Are Most To Blame For Seniors' Related Hospitalizations 10:14AM

Analysts Wondering About Taveris Prospects For Senate Confirmation NOV 25

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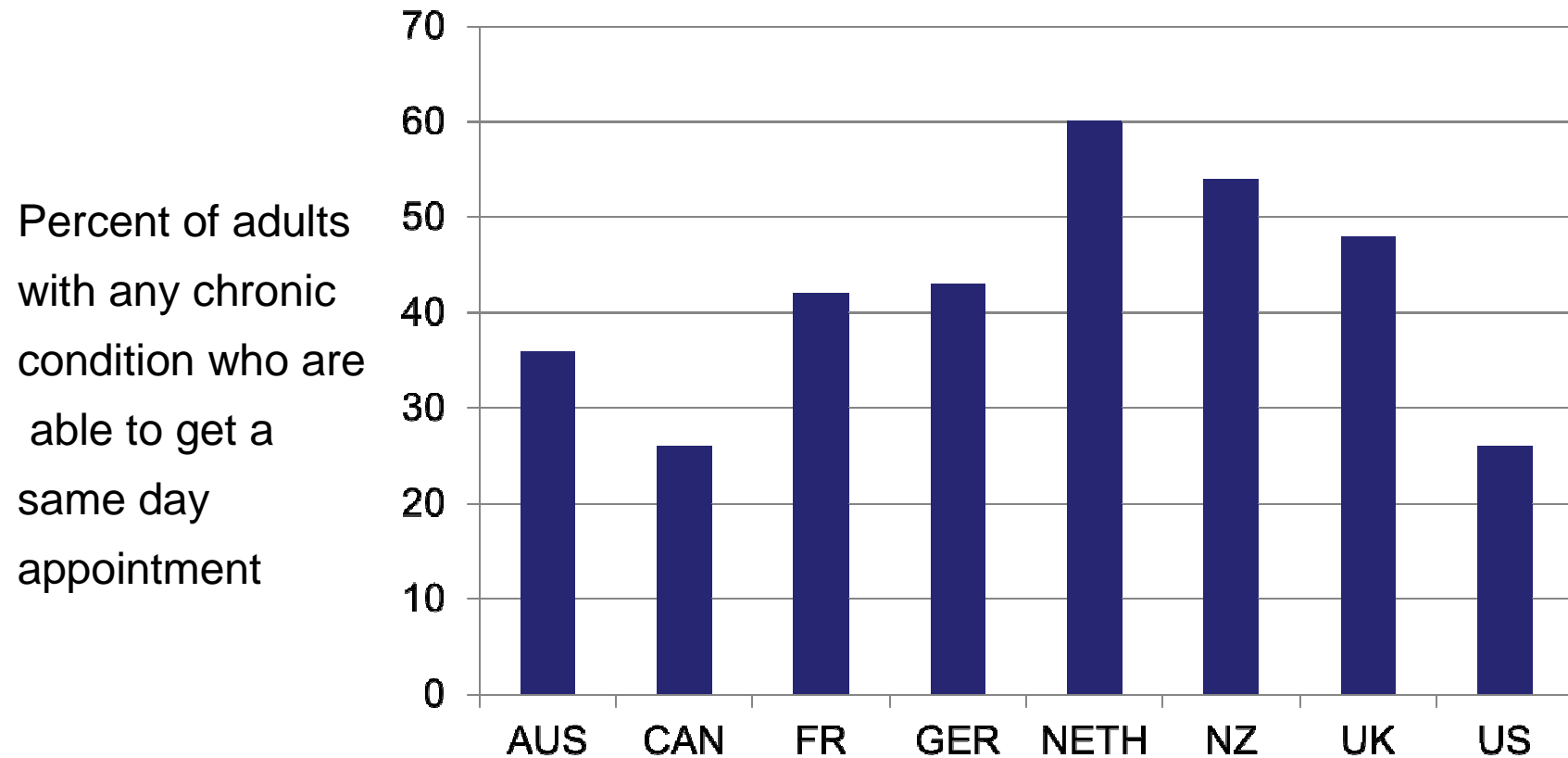
Kaiser Health News is a program of the Kaiser Family Foundation

Average per capita health care spending is high and growing, 1980–2008



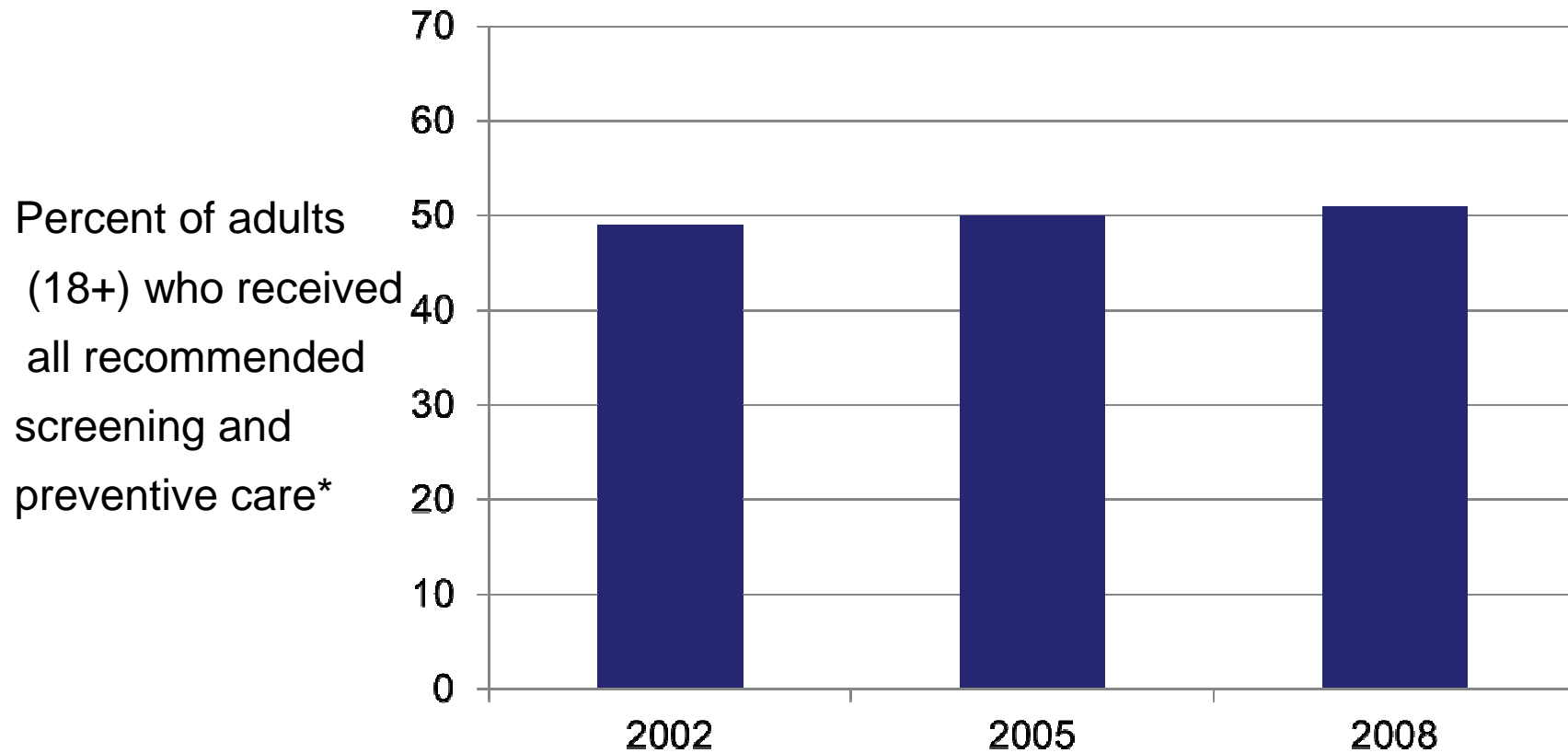
Source: Commonwealth Fund analysis of OECD Health Data 2010 (Oct. 2010).

Access to doctors is suboptimal



Source: 2008 Commonwealth Fund International Health Policy Survey of Sicker Adults.

Quality of care in US is poor



* Recommended care includes at least six key screening and preventive services and is adjusted for age and sex.

Data: N. Tilipman, Columbia University analysis of Medical Expenditure Panel Survey.

Source: Commonwealth Fund, 2011.

Additional US challenges

- With passage of 2010 health care reform, there will be an increased demand for primary care
- Primary care doctors are in short supply
 - Low reimbursement for primary care leading to comparatively low salaries
 - Low prestige
- Widespread disparities in access and utilization

Two responses to the challenges

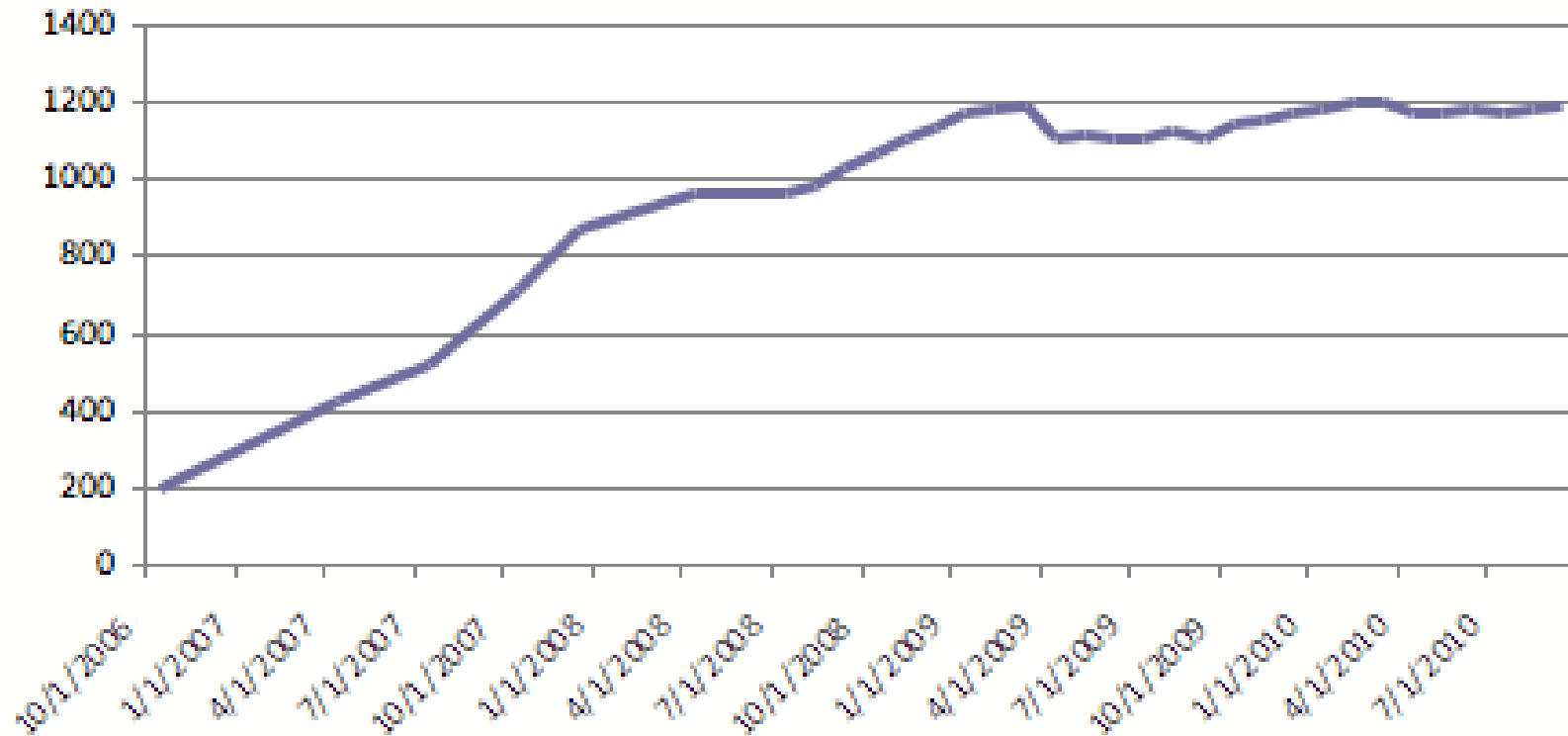
1. Retail clinics
2. Primary care medical homes

Retail clinics are a new model of care

- Located in retail stores
- Nurse practitioner
- No appointments & in/out in 20 min
- Night and weekend hours
- Menu of conditions with prices



Industry has seen rapid growth



Source: Merchant Medicine, <http://www.merchantmedicine.com/home.cfm>



Find a Clinic or

Services and Costs

[Minor illness exams](#)

[Minor injury exams](#)

[Skin condition exams](#)

[Wellness & physical exams](#)

[Health condition monitoring](#)

[Vaccinations](#)

[Labs & tests](#)

Patients are responsible for either their insurance copay or price listed on our menu. If you're insured, we recommend you contact your insurance company before your visit.

Minor illness exams

When you're not feeling your best, we can help. We can evaluate and diagnose your symptoms, and write prescriptions when medically appropriate. You'll leave with the treatment plan you need to get better faster.

Services range from \$79 - \$89

Come to us for:

- Allergy symptoms (2 years+)
- Body aches
- Cough
- Earache / ear infection
- Flu-like symptoms
- Itchy eyes
- Mononucleosis (mono)
- Motion sickness prevention
- Nasal congestion
- Pink eye & styes



Find a Clinic or

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Services and Costs

Minor illness exams

Minor injury exams

Skin condition exams

Wellness & physical exams

Health condition monitoring

Vaccinations

Lab & Tests

Health condition monitoring

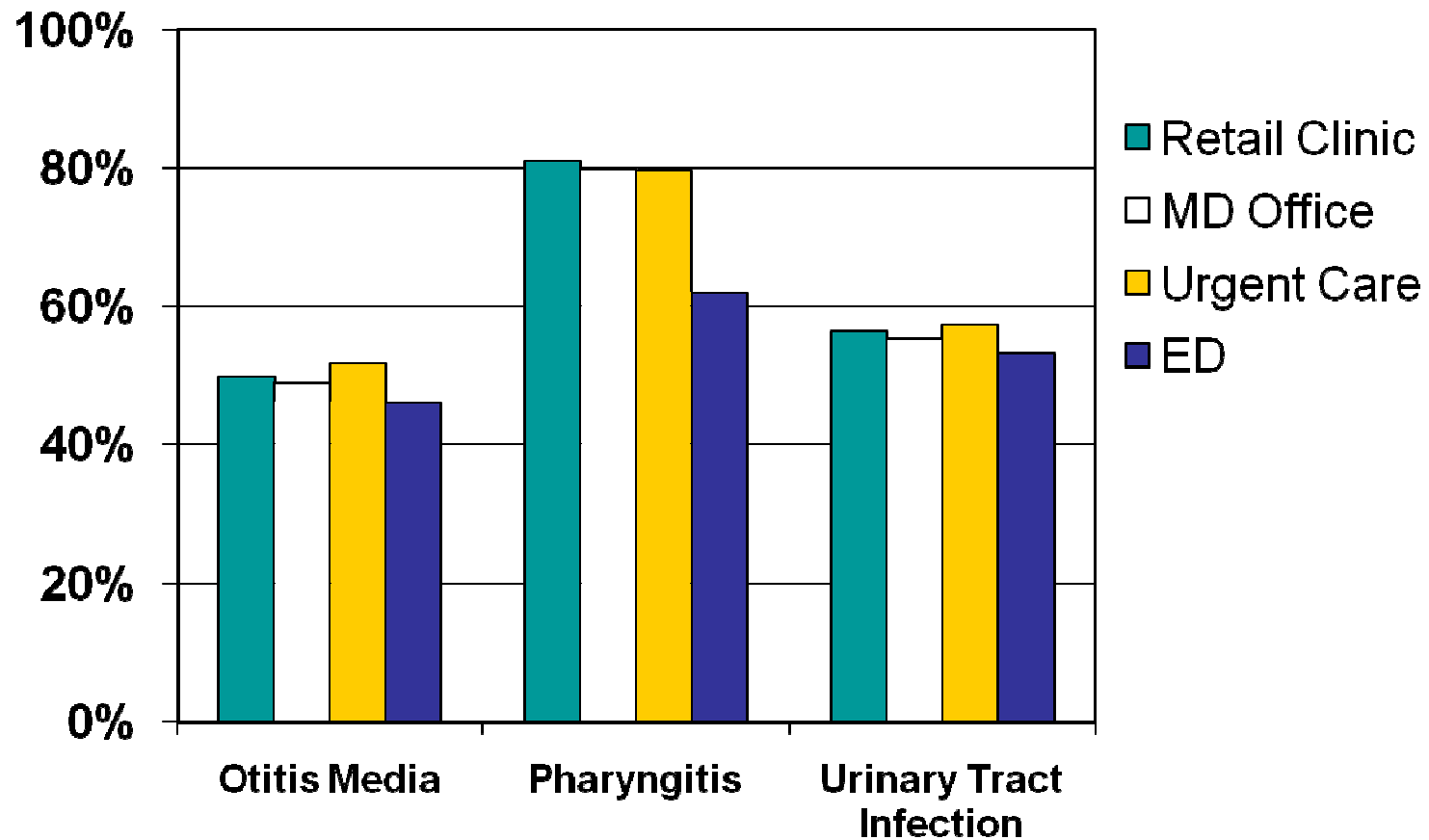
When you need to stay on top of a chronic condition, we can help. We provide routine tests, fast results and educational support for those diagnosed with diabetes, high cholesterol, high blood pressure or asthma.

Services range from \$59 - \$89

Come to us for:

- Asthma monitoring \$79-\$89
- Diabetes monitoring \$79
- High blood pressure monitoring \$59
- High cholesterol monitoring \$79

Case-control study of quality of care, 2005-2006



Mehrotra, A., H. Liu, J. L. Adams, et al. *Ann Intern Med*, 2009; 151: 321–328.

Prices relative to other sites of care

- For an episode of care:
 - \$110 at retail clinic
 - \$166 at physician office
 - \$156 at urgent care centers
 - \$570 at emergency department visit
- Similar prescription costs

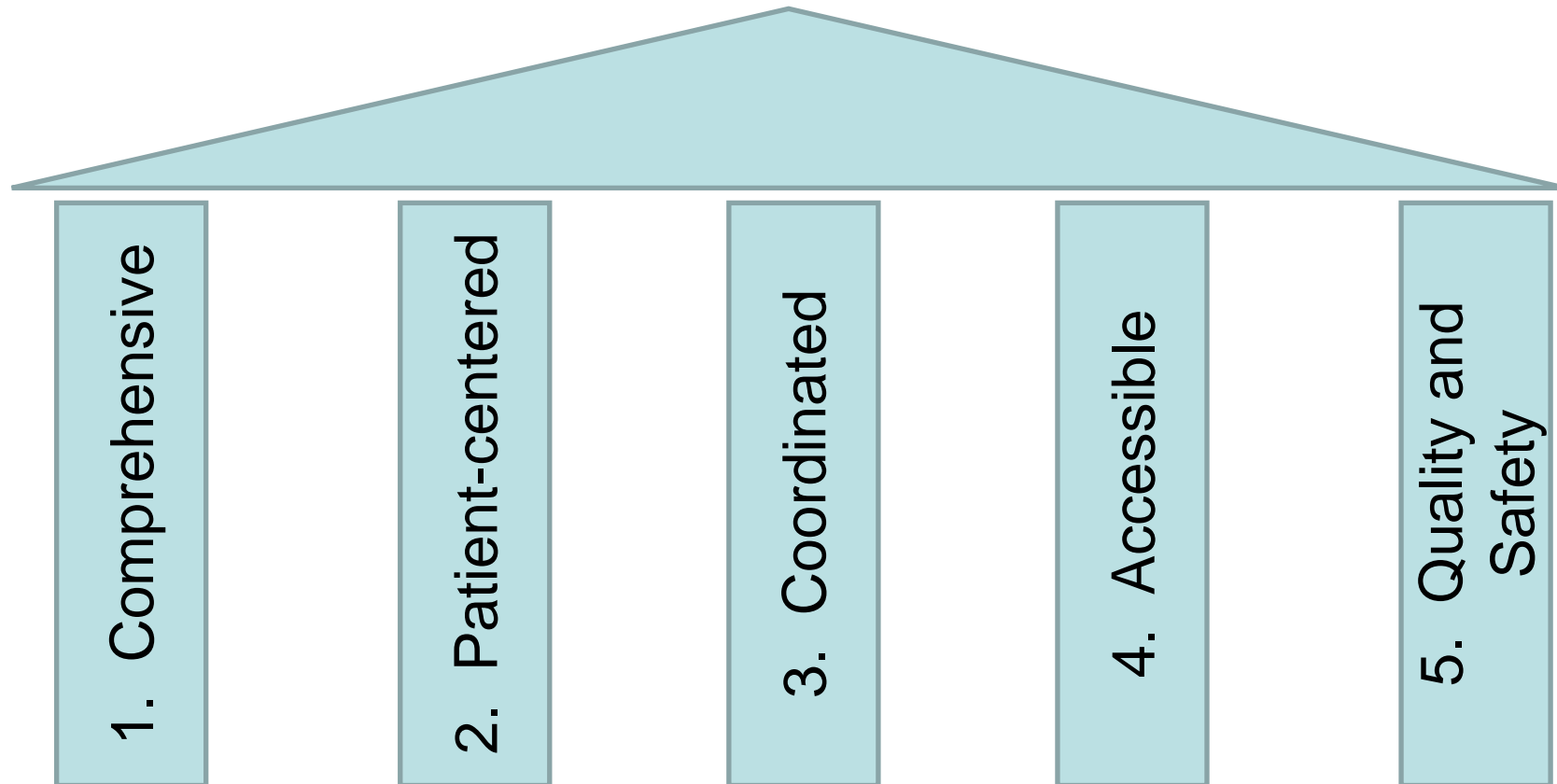
Concerns remain

- Physician organizations have discouraged their use by children and opposed expansion of services
- Fears about continuity and coordination of care
- Concerns over missed opportunities
- Potential for induced demand

Two responses to the challenges

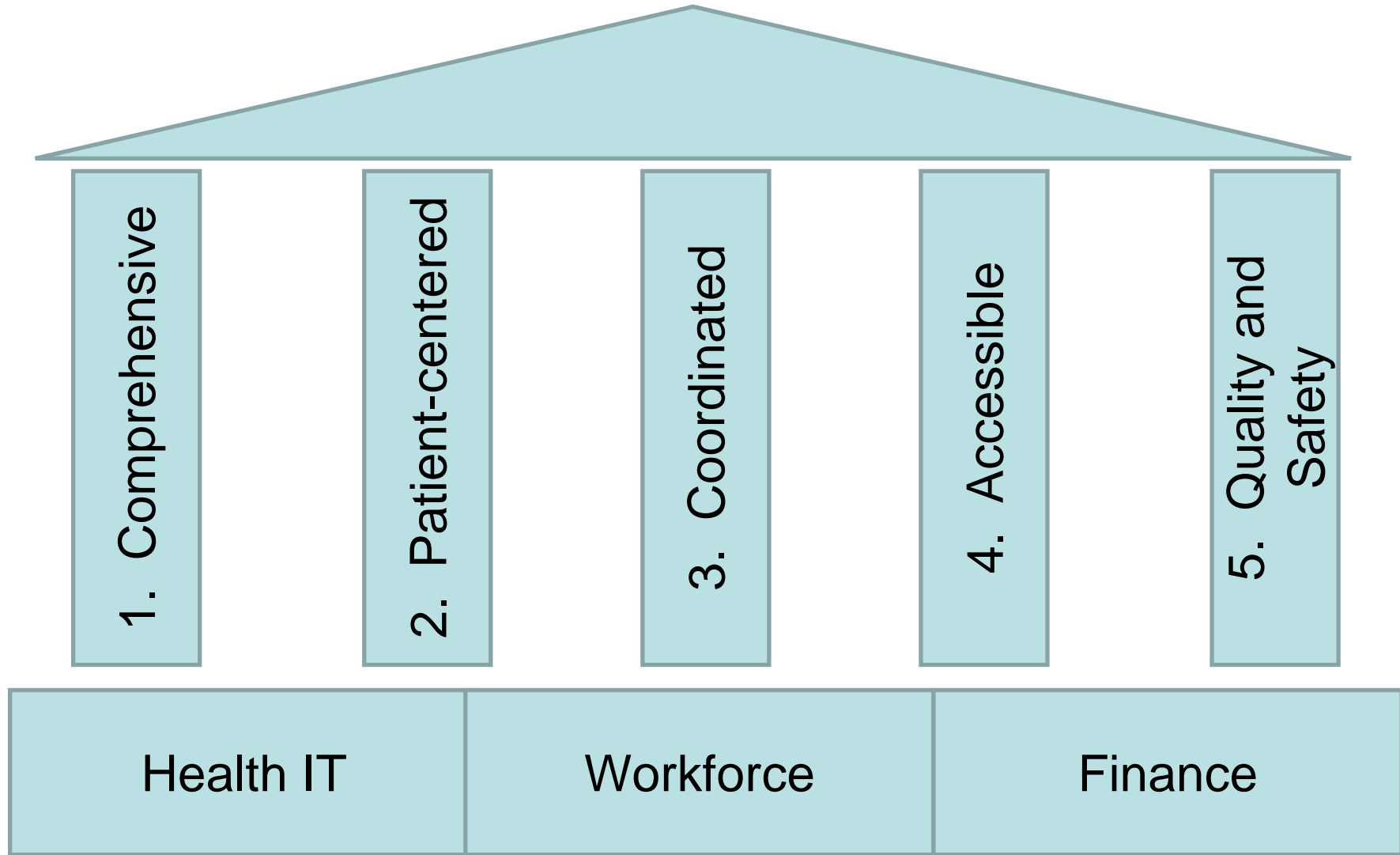
1. Retail clinics
2. Primary care medical homes

Pillars of the medical home



Agency for Healthcare Research and Quality (AHRQ),
[http://pcmh.ahrq.gov/portal/server.pt/community/pcmh_home/1483/
PCMH_Defining%20the%20PCMH_v2](http://pcmh.ahrq.gov/portal/server.pt/community/pcmh_home/1483/PCMH_Defining%20the%20PCMH_v2)

A strong foundation



Early results are promising

- Cost savings have been demonstrated in integrated health care systems
- Demonstration projects are underway
 - 26 demonstrations in 18 states
 - 14,000 MDs caring for nearly 5 million patients
 - Typically single payer

Paulus RA, *Health Aff (Millwood)*. 2008; 27: 1235-45.

Reid RJ, *Health Aff (Millwood)*. 2010; 29: 835-43.

Bitton A, *Journal of General Internal Medicine*, 2010; 25: 584-92

Challenges to widespread adoption and success remain

- Transforming practices into medical homes
 - Health Information Technology, team building
- Coordinating across the ‘Medical Neighborhood’
- Reforming payment models

Can these reforms meet the health care's challenges?

	Retail clinics	Primary care medical homes
Cost	+/-	+/-
Access	+	+
Quality	=	+/-

Future directions

- Both retail clinics and medical homes will continue to grow in the coming years
- To what extent will each be able to lower costs and improve quality?
- Will the two approaches compete with one another?
- Will the distinction between the two begin to blur?